The Higher Education
Benchmarking Consortium

FY 02 Sponsored Programs Survey
Data Analysis System Instructions

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Introduction

The purpose of this document is to introduce you to the SRA-BearingPoint Sponsored Programs Benchmarking Survey Data Analysis System. The Data Analysis System allows custom reporting on any of the data submitted by the participating institutions in response to the FY 2002 Sponsored Programs Survey.

The data has been "scrubbed," meaning that survey administrators reviewed the data from a high-level perspective. Any data points that fell far outside the norm were marked for review. Changes have been made where necessary and the data that is final is considered, "scrubbed." [1]

The instructions will get you started in using the Data Analysis System. Like with many new systems, there will be a learning curve. It will take time to become familiar with the various reporting options available. However, by sticking with it and try different combinations, you will find that you can build an incredible amount of useful comparative data for your institution. You are, in fact, given access to the entire database with a reporting tool attached to it. Explore the many different types of tables, charts, reports, sorted lists. Save slides and practice making slide shows. You have the capability to build an array of information. That information that can be plugged into slide shows to display to your staff, colleagues, Board of Governors, Accreditation Committees, etc. In addition, the raw data can be downloaded for use in other commonly used reporting utilities.

Technical and General Notes

Some issues have been reported concerning the pop up windows not working properly in Netscape. We suggest using IE5 or later to assure the best results.

In general, use the back button to get back to a table you have made. Using the back button allows you to view the table as you last left it, instead of remaking it.

In almost every screen, there is content-sensitive help. Click on the Help link at the upper right corner of the screen.

Sub-Tabs

There are several sub-tab options available from within the Benchmarking Tab: Slide Shows, Comparison Groups, Tables and Graphs, Report Writer, Sorted Lists, Crosstabs & Frequencies, Custom Variables, and About Benchmarking. These directions will take you through each of the sub-tabs.

Logging In

OK, let's get started. To access the system, follow the following instructions:

1. Enter www.HigherEdBenchmarking.com
2. The login link is located near the upper right-hand corner of the page. Click on the "Data Entry and Data Analysis System" link to navigate to the login page.
3. Enter your e-mail address in the space provided
4. Enter your password, and click on the Log In button.
   - Your password was e-mailed to you. If you do not have it, click on: "Forgot your password? Simply enter your email address above and click here." found under the Log In button.
5. After you log in, you may change your password. In the Home tab, next to your Personal Info, there is an underlined link called, "Edit Personal Info." Click on that link. You may

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[1] Neither SRA nor BearingPoint can assure the validity or correctness of the data. The data retrieved from the Data Analysis System is meant for institutions' internal use. It is not intended for general publication.

update any/all the information in that screen. At the bottom of that page, you have the opportunity to change your password. Be sure to click on the Save button when you are finished.
6. Once you are logged in, you should come to a screen that has your personal information and a menu bar that includes a Benchmarking tab. Click on Benchmarking to access the Data Analysis System.

Slide Shows, Part I

The screen default for the Benchmarking Tab is the Slide Shows sub-tab option. The first time you enter this screen, you will see one public slide show: FY 2000 Sponsored Programs Custom Report. By clicking on the name of the slide show, you will come to a screen with a lot of instructions that include terms reviewed in this document. Come back to this Slide Show after you have worked with Comparison Groups, saved some slides, and had some other experience with the system.

In the future, after you have saved slides and slide shows, this page will be populated with the information you have saved. We will come back to this topic at the end of these instructions. Throughout the topics, there will be notes on saving slides. Please save your slides, as we will put together a slide show at the end of the instruction guide.

Comparison Groups

Comparison Groups are defined sets of Institutions used for benchmarking purposes. They allow you to compare aggregate results of a group to your own institution or to other groups.

In order to provide a starting point and to facilitate comparisons, the study team developed standard comparison groups based on a number of factors. The most commonly used groups are Large, Mid-Sized, and Small Institutions, based on volume of research expenditures. Other comparison groups are Biomedical Institutions, Institutions with Medical Schools, and Land Grant Institutions.

You will create your own comparison groups and save them for unlimited use, and you may share those groups with others in your institution and with your peers who are participating in the survey system.

When you first come to this page you see any **Public Groups** that have been created and distributed by your site administrators, and any **Shared Groups** that have been created and shared.

To get started, you must “accept” the groups that have already been created.

1. From the Comparison Groups tab, click on the plus signs in front of Public Groups and Shared Groups (The "+" and "-" signs next to the group categories [Personal, Shared, Public] allow you to expand and collapse the lists of groups under the category). There will be groups in that list that you want to use, and some that will not help you.
2. Click on the square next to all the groups that begin with the label SP (for Sponsored Programs). Participants in other surveys use the other groups. If you choose one of the other groups, you will get very little information because those institutions may or may not be participants in the Sponsored Programs Benchmarking Program.
3. Click on the gray box labeled Save Changes. It is found at the right of the screen at the top and the bottom of the list of groups from which you chose.
4. From time to time, check back in the Comparison Groups tab. You may find that your peers have made some of their groups publicly available. However, you won’t see them in your list of active choices unless you have “accepted” them as instructed in this section. Administrators will send out periodic notes informing participants of changes made since the last update.

To make a New Comparison Group from the group of institutions that have been scrubbed so far:

1. From the Comparison Groups page, check the box next to SP – 02 All Institutions.
2. Click on the "Copy to Personal" icon to the left of the group name (If you move your mouse over the icons, you will see a small pop-up window that explains what each icon does). By copying to personal, you will then be able to manipulate the list. Participants can't manipulate public lists, but they can copy them to their personal files and manipulate them. This security measure assures that the standard lists remain intact.
3. Scroll up to Personal Groups and see that the newly copied group is listed. Click on the name of the group. The next screen should show the Comp Group name, Comp Group Selection Criteria Description, Add More Institutions, and the list of institutions included in the group.
4. Change the name of the copied group to a new name that will clearly describe the group you are about to make. Pick something clear and obvious, such as SA Big Ten or SA California Schools. Click on the gray button that says, "Save List." The next screen will show all the comparison groups. Click on the name of the group you just created. You will return to the screen you saw in #3.
5. Next, you will "narrow down" your list. You are starting with the list of all participating schools. To create your new list, you will narrow down by eliminating the schools that do not fit the category with which you want to work in this comparison group. Notice that all of the are checked. To "uncheck" them, click on the white box that contains the check mark. Once you have narrowed the list to your specifications, save the new list.
6. When you are finished making Comparison Groups, return to the main Comparison Groups page. Make sure that each Comparison Group with which you want to work (in Personal, Shared, and Public Groups) is checked, and you save your preferences at the top or bottom of this screen.

Tables and Graphs

This tool is designed to help you explore differences between your institution and groups of other institutions viewed in the aggregate. Click on this topic (it is the 3rd choice in the horizontal bar under the Benchmarking Tab). When you first come to the Tables and Graphs page you will see a default table showing your Institution in a blank chart.

Once you see the basic default table, you can begin to modify it to get the information you seek. You may change the variable being analyzed, you may add institutions or comparison groups, in the future when you have entered data in multiple years, you may change the range of years being analyzed, etc. You can also change the view from table to graph. The following example illustrates how to do a basic comparison.

Let's say you want to compare your institution's Student Affairs/Student Services Enrollment with your peers who completed the FY 2002 Survey.

1. First, adjust the range of years to begin and end at FY2002 by clicking on 'edit' below the Fiscal Year column. This will focus the analysis on FY 2002 results.
2. Next, click on 'Change Variable' or 'Add Variable'. This is found just above the chart. It is in black underlined lettering. In the pop up window, select the variable family "SA – Enrollment"; and then the variable 'Enrollment – Grand Total'. Click on 'use variable.' In the table you will see the enrollment number you reported in FY2002.

   Click on 'Save as Slide.' You will see a prompt to enter a Slide Name. Be as specific as you can – this will help you later. Click on the Save Slide button. The system will take you to a fresh list of Your Slides. You should see your new slide listed. Feel free to click on it. **When you are finished, click the back button to return to the chart you made (not the slide of the chart – but the actual chart a few screens back).**
3. Next, click 'add comparison group' and add the group called 'SA All Institutions FY 2002 ____ (The ___ denotes the latest date that the All Institutions group was updated). You

will see a redrawn table showing the comparison between your institution and the mean enrollment data for all the institutions that finished the survey. Click on ‘Median’ to see the median enrollment data. Click on the underlined value for the SA All Institutions FY 2002 to see where your data appears in a list sorted from biggest to smallest enrollment. In the future, click on any value that is underlined to see the sorted list of institutions included in that figure. Save the slide, and **use the back button to return to the chart.**

4. You can then easily change to another variable, add another comparison group, add an institution, etc. Experiment by clicking on the options you see above the table.
5. To see the table drawn as a graph, click on the underlined word “Graph” above the chart. To go back to the table, click the back button on your browser.
6. To view the table without graphics, click on Graphics-Free table.
7. You can also use tables to display multiple variables and multiple comparison groups at the same time. First add a few comparison groups with which you would like to work. Then, move your mouse over the red arrow box next to the “FY 2002” text in the table. The pop-up window will read, “Pivot on this fiscal year.” Click on it. By "pivoting" the table, you can see the comparison groups in the left column, and you can add variables along the top by choosing Add Variable. You may also delete a comparison group or a variable by clicking on the red X next to the comparison group or the variable.
8. The tables can easily be downloaded to a spreadsheet. Click on ‘Non-HTML table.’ When the system brings up the pop-up window, click on Help and follow the directions to download the information to a spreadsheet.

Once you understand the function, work with the options to generate data that would be most useful to your institution.

Report Writer

This feature provides a table containing multiple variables for a specific comparison group for a specific year (choose FY 2002). Survey administrators suggest that participants get used to the Data Analysis system by creating comparison groups and using several variables (possibly creating your own calculated variables) in Tables and Graphs before using Report Writer. Report Writer combines all of these choices into one report. So, understanding the differences between the options first will make using Report Writer both easier and more meaningful.

To use Report Writer:

1. Click on the Report Writer tab.
2. Report Style: Choose Complete by clicking the radio button next to that word. The Sponsored Programs Benchmarking Survey is “blind,” meaning participants cannot see each other’s individual answers. Other surveys are “open”, meaning survey participants can see a complete listing of the data.
3. Include Zeros: This is a choice made by the participant. Try including and excluding zeros in your reports to see how the exclusion changes the data.
4. Fiscal Year: always choose FY 2002.
5. Comparison Group: For this exercise, choose SP FY 2002 ‘Large Institutions’ 12/31/03
6. Use Divisor: This would create a ratio out of your data. You may choose a divisor, or leave it blank to show a non-calculated piece of data in the report. For demonstration purposes, choose None.
7. Variables: this will be populated in the next step. We will go back to it.
8. Add Variables
    a. First Select a Family Group: If you have created your own Calculated Variables, you will have two choices here – Sponsored Programs and Other. For demonstration purposes, choose Sponsored Programs
    b. Then Select Family: For demonstration purposes, choose SP – Benchmarking Metrics

    c. Then Select a Variable: For demonstration purposes, choose the two options by holding the Ctrl key while left-clicking on the two choices shown: Number of New Awards as a Percentage of Number of New Proposals Submitted and Number of Proposals Submitted per Central Sponsored Projects Administrative FTE.
    d. Click Add (bottom of screen)
9. Note that the Variables have been added. The Trash Bin icons next to the variable give you the option of deleting the variable from the report. You may continue to add variables, or Generate the Report.
10. Once you generate the report, you may Save as Slide, and/or go back (use the Back Button on your browser) to change or add to the report. Feel free to experiment with different variables, comparison groups, etc.

Once you understand the function, work with the options to generate data that would be most useful to your institution

Sorted Lists

The Sorted List function will help your institution see where it "stands" in comparison to other institutions. This is best used for straight numerical figures. The following example provides instructions for how to use this function.

1. Click on Sorted Lists under the Benchmarking Icon.
2. Next to Comparison Groups: click on the drop down menu and choose SP FY 2002 'Mid-Sized Institutions' 12/31/03
3. Next to Limit List to: click on the drop down menu and choose 20 Institutions
4. Next to Sort Order: click on the drop down menu and choose Highest First
5. Next to Starting Year: leave the choice on 2002.
6. Next to Ending Fiscal Year: leave the choice as Same as starting fiscal year.
7. Next to Use Divisor: choose None.
8. Next to Variable: click on the drop down menu and choose Sponsored Programs
9. Then select a family: click on the drop down menu and choose SP Demographics.
10. At the next drop down list: choose Total institutional expenditures.
11. Click on Generate Sorted List.
12. The next screen will show a generated list. Your institution will appear (highlighted) if it fits in that category. If your institution is not one of the first 20 institutions, you can use the Back button on your browser to change the parameters so that your institution is included in the list.
13. Save as Slide.

Once you understand the function, work with the options to generate data that would be most useful to your institution.

CrossTabs and Frequencies

Frequencies show the rate of occurrence of a data point. This function is applicable only to certain types of questions – those that ask "to what degree does your institution …" Respondents choose a number to denote the degree (see question 16 in the survey).
The number of institutions that answer for each degree can be transferred into a frequency table. Crosstabs would be a more complex way of looking of the data; however, the questions from this survey do not work well in the Crosstab function.

To create a frequency table:

1. Click on Crosstabs and Frequencies
2. Comparison Group: Choose SP FY 2002 'Small Institutions' 12/31/03
3. First Fiscal Year: Choose FY2002
4. Second Fiscal Year: Choose No second Fiscal Year

5. Row Variable: Select a Variable Family: Choose SP – Degree of Functional Decentralization
6. … then select a variable: Reviewing and approving proposals and budgets
7. Column Variable: You would choose this if you were to make a Crosstab. Skip this step.
8. Click on the gray button: Generate Frequency Table

The resulting table shows the distribution of responses – between highly centralized and highly decentralized - among the participating institutions in the group of small institutions. The table also shows how many institutions answered the question. Your institution's data does not show up separately on this page. A future update the system will include your institution's answer separately. Until that update is made, you will need to have your answer available for comparison purposes.

9. You may save these tables as slides.

Once you understand the function, work with the options to generate data that would be most useful to your institution

Custom Variables

Participants can create custom variables for use in Tables and Graphs, Report Writer, and Sorted Lists. This would be used when a potentially useful variable is not found in the choices already available. The system allows participants to add, subtract, divide, and/or multiply any numerical data point with any other numerical data point. Then, the new variable is named and can be used when necessary. The new custom variable can be used within another custom variable as well. For demonstration purposes, follow the following instructions to create a custom variable.

1. Click on Custom Variables.
2. Click on Add a Custom Variable.
3. Skip New Variable Name for now.
4. To the Left of the Operator – First Select a Family Group: Choose Sponsored Programs.
    a. … then select a family. Select SP – Expenditures by Source of Funds.
    b. … then select a variable. Select Total SP Expenditures (Q. 14).
5. Operator: For demonstration purposes, choose: /.
6. To the Right of the Operator: First Select a Family Group … choose Sponsored Programs.
    a. … then select a family. Select SP: Staffing Data.
    b. … then select a variable. Select Number of Funded Investigators/Project Directors (Q 11a).
7. Variable Type: Choose Dollars.
8. Go back up to New Variable Name. The best name you can give the variable is one that is as clear as possible to remind you what is included in the calculation. I would name the new variable in this demonstration "Total SP Expen. Div. by No. Funded PIs."
9. Click on the grey box at the bottom, "Save Variable."
10. Now the variable will be available to you in your drop down list of choices in Tables and Graphs, Report Writer, and Sorted Lists. It will be included in the variable family called "Other." For example, in Tables and Graphs, if you click on Change Variable, the pop-up window will contain three lines of options. The first will be First Select a Family group. Click on the drop-down arrow, and choose Other. The next window below will automatically switch to Personal Variables. The final window will be a list of the calculated variables you created.

Once you understand the function, work with the options to generate variables that would be most useful to your institution.

Slide Shows, Part II

To view the slides you have created, click on the underlined 'Go to Slides.'

1. To create a slide show, click on the underlined, ‘Create a New Slide Show.’ Be specific when you create the name. You may make the slide show public by clicking the box next to ‘Share this Slide Show.’ In the drop-down list next to Group, choose Sponsored Programs Administration. Click on the tab that says ‘Save Slide Show.’ The computer will return to the list of slide shows, which will now include your new show.
2. By clicking on the icon that looks like slides (between the garbage can and the pencil) you can add slides to your show. Click on the white check boxes next to the slides you would like to include in the show. Then click the arrow that points to the right (it is in the middle of the screen). The system will show a list of the slides, with options to adjust the order of them. You may also add or remove slides via the right and left arrows in the middle of the page. When you are finished, click on the ‘Done’ tab at the bottom left corner of the screen.
3. The slide show name will appear, and the number of slides will show in the column to the right of the slide show name.
4. You can adjust the name of the show, and whether you want to share it, using the Pencil icon to the left of the name of the show.
5. You may also enter the slide show to add, move, or delete the slides by clicking on the Slide icon.
6. By clicking on the underlined title of the show, you can adjust other properties of the show, such as fiscal year data.

Comments

The study team will add instructions and advice to this document periodically. We invite your questions and comments so that we may update information for you and your peers. Please watch your e-mail for more information.

If you have any questions about the uses of the system please contact the study team: Jennifer Lipnick Jennifer.Lipnick@BearingPoint.com and Bill Kirby at wkirby@crosslink.net. We are happy to provide assistance or a tutorial.